

DRAFT
24 June 1964

MEMORANDUM FOR: Economic Intelligence Committee

SUBJECT: Annual Report of EIC Subcommittee on Minerals and Metals for FY 1964

REFERENCE: EIC-D-574, Subcommittee Annual Reports for Fiscal Year 1964

A. Activities of the Subcommittee During Fiscal Year 1964

1. Review of the Intelligence Product in the Subcommittee's Field of Competence

During FY 1964 no meetings of the Subcommittee were held. However, there was a significant amount of informal communication and coordination between committee members and between other representatives of the participating agencies on problems in the minerals and metals field.

2. Research and Collection Deficiencies

The Subcommittee notes the scarcity of information on the minerals and metals industry in Communist China, in particular information which would explain the decline in Chinese exports of tin, antimony, and tungsten.

3. Priority National Economic Intelligence Objectives

The statement of priority national economic intelligence objectives approved by the EIC in February 1964 (EIC-D-566/1) should be most useful as a guide for the collection, production, and coordination of information in the Subcommittee's area of responsibility.

4. Review of Substantive Papers

The Subcommittee did not review any substantive papers during FY 1964. However, review and coordination of papers and estimates continued on a bilateral basis. For example, a representative of the Division of Minerals, U.S. Bureau of Mines, reviewed a paper on the Soviet gold position and the Minerals and Metals Branch of CIA coordinated a paper on tin prepared by the Bureau of Intelligence and Research, State.

5. Review of Proposals for External Research

None

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6. Maintenance of Agreed Basic Statistics

The 1964 issue of the Economic Intelligence Statistical Handbook will contain CIA estimates of Communist World production of the following minerals and metals:

Metallurgical coke	Refined copper
Crude steel	Primary aluminum
Pig iron and blast-furnace gas	Bauxite
Ferroalloys	Smelter production of lead
Iron ore	Refined zinc
Manganese ore	Smelter production of primary
Refined nickel	tin metal
Chromite	Primary magnesium
Molybdenum	Titanium sponge metal
Cobalt	Gold (Soviet production and holdings)
Tungsten ore	Metallurgical equipment

Subcommittee members will be asked to review these estimates upon receipt of the Handbook.

7. Projects Undertaken at the Request of the EIC or Proposed to the EIC

None

8. Intelligence Research Techniques

None

9. Special Coordination Functions of the Subcommittee

None

10. Evaluation of the Role of the Subcommittee

The Subcommittee serves primarily as a convenient means of coordinating the production of intelligence on the minerals and metals industries of the Communist World.

B. Future Program of the Subcommittee

The Subcommittee will maintain agreed basic statistics in its field and will continue to be available for consultation among its members and for such other purposes as the EIC may direct or the needs of the intelligence community may indicate.

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